

CITY OF CHARLESTON STATE ACCOMMODATIONS TAX AND COMMUNITY ASSISTANCE GRANT PROGRAM

**Pre-Application Workshop
Charleston County Library**



Agenda



1. Welcome and Introduction
2. General Overview of Grant Programs
3. Eligibility
4. Application Instructions
5. Community Assistance
6. Accommodations Tax
7. General Overview of Web Analytics

Welcome and Introduction

- City of Charleston
- Workshop Facilitator –
Kathy Mercer,
Budget and Management Director

Overview of Grant Programs

- Community Assistance
 - *Cherrie-Ann Caton, Grants Compliance Manager*
- State Accommodations Tax
 - *Kathy Mercer, Budget & Management Director*

Eligible Organizations

- Must be a non-profit
 - 501(c)(3) charitable organization
 - church/religious organization
 - government entity
 - other-not common
- Individuals or for-profit businesses are not eligible

SC Secretary of State's Division of Public Charities

- Website – www.scsos.com
- “Solicitation of Charitable Funds Act”
- File an annual registration
- Also file annual financial report

Who:

- All Charitable organizations that solicit contributions or have contributions solicited on their behalf in SC unless they fall under one of the statutory exemptions
- \$50 filing fee
- Exempt organizations must file Application for Exemption annually - no filing fee

SC Secretary of State Website

Website – www.scsos.com

The screenshot displays the official website of the South Carolina Secretary of State, Mark Hammond. The browser's address bar shows the URL <http://www.sos.sc.gov/index.asp>. The website features a blue header with the Secretary's name and a portrait. A red arrow points to the 'Online Services' link in the left-hand navigation menu. The main content area includes a welcome message, a list of services, and a 'News and Important Notices' section. The right sidebar contains a search bar and various links for users.

South Carolina Secretary of State
Mark Hammond

From the Secretary's Desk

Welcome to the Secretary of State's Office

Thank you for visiting the online office of the South Carolina Secretary of State. Our goal is to provide you with easy access to information from the convenience of your home or office.

Each division of the Secretary of State's Office provides diverse services and information to the citizens of South Carolina. This Website is designed to serve as your one-stop site for accessing general information as well as providing information specifically related to each division. I invite you to take advantage of this convenient resource.

Mark Hammond

SC Secretary of State's UCC Online wins **National Award**

News and Important Notices

REGISTER HERE FOR 2014 NOTARY PUBLIC SEMINARS - 6/18/2014
2014 legislative session brought many critical improvements to laws regulating notaries public.

Secretary of State Hammond Announces Long-awaited Improvements to South Carolina's Notary Public Act - 6/18/2014
Most sections of the law had not been updated since the 1960s.

Memorial Day Weekend Counterfeit Activity Nets Three Arrests by Local Law Enforcement - 5/27/2014
More than \$151,000 in cash, fake goods seized by Secretary of State and Horry County Police

Secretary Hammond Announces the Signing of Charities Bill Into Law - 3/19/2014
House Bill 3367 offers technical amendments to the Solicitation of Charitable Funds Act.

Site Search

Featured Links

Corporation Search

UCC Search

Charity Search

Notary Search

SC Boards and Commissions
Vacancies and Expired Terms

UCC Online
Filing, Search and Document Retrieval

Charities! Professional Fundraisers!
File Online Here

COUNTERFEIT GOODS
NOT A VICTIMLESS CRIME!

SC.GOV
The Official Web Site of the State of South Carolina

SC Business One Stop

Online Services

Business Filings

Public Charities

Notaries and Apostilles

Trademarks

Cable Franchise Authority

Service of Process

Boards and Commissions

Municipalities

Consumer Information

Forms and Fees

Contact & Feedback
Do you have feedback for us?

Site Survey
Tell us what you think.

Home

Driving Directions

Site Map

Terms & Conditions

Physical Address: Edgar Brown Building - 1205 Pendleton Street Suite 525 Columbia, SC 29201

Application Instructions

- Web Address
- Financial Information
- Reporting Process
- Tips and Guidelines

City of Charleston

□ Web address –

www.charleston-sc.gov

CASAT Grant Application

The screenshot shows the City of Charleston website with the following elements:

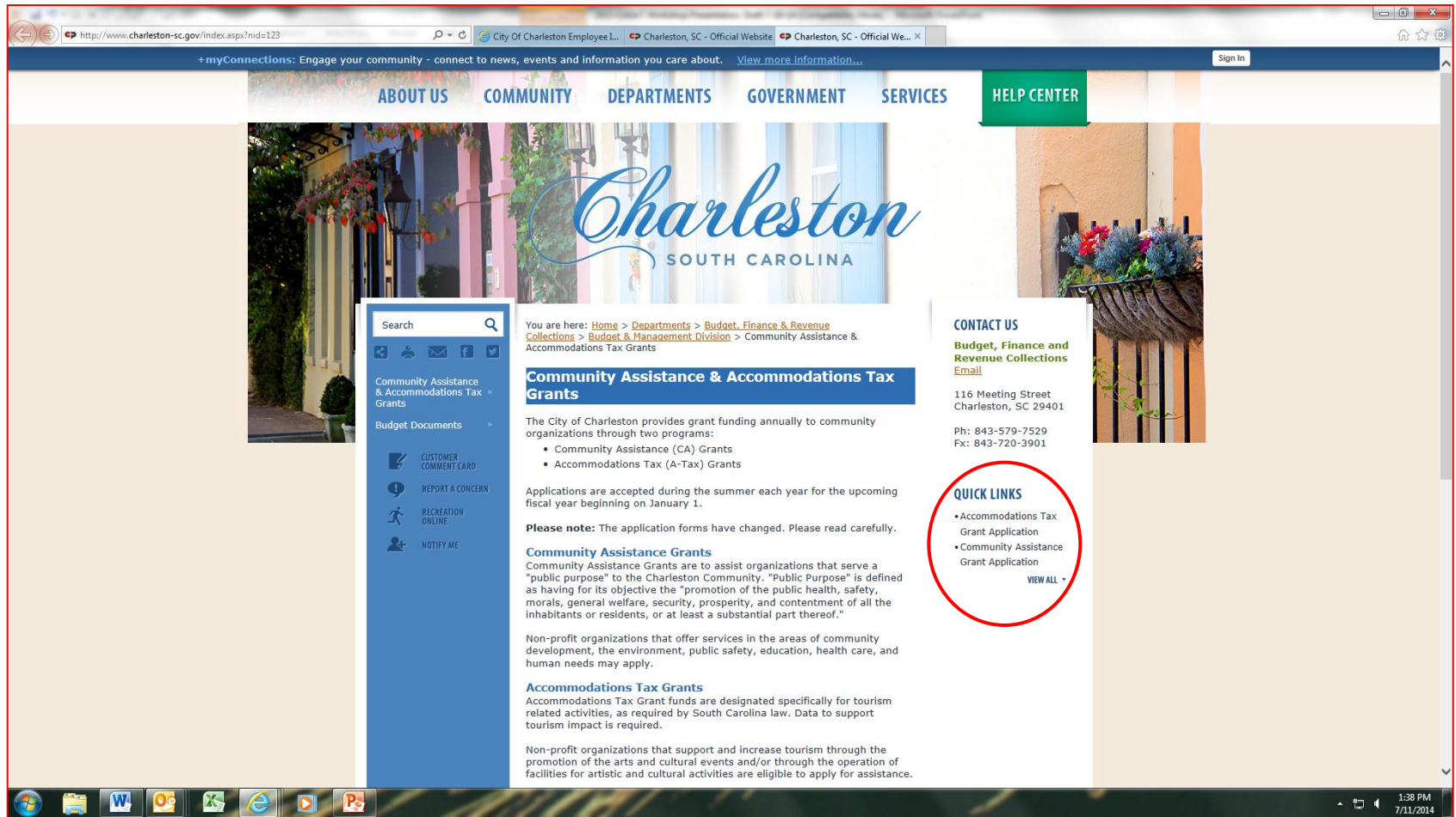
- Browser Tabs:** "City Of Charleston Employee I...", "Charleston, SC - Official We..."
- Address Bar:** "http://www.charleston-sc.gov/"
- Header:** "+myConnections: Engage your community - connect to news, events and information you care about. [View more information...](#) Sign In"
- Navigation Menu:** ABOUT US, COMMUNITY, DEPARTMENTS, GOVERNMENT, SERVICES, **HELP CENTER**
- Main Banner:** "Charleston SOUTH CAROLINA" with a background image of a street scene.
- Left Sidebar:** Search bar, social media icons, and a list of links: Employment, Agendas & Minutes, BidLine, Municode, GIS & Interactive Maps, Visitors.
- Center Content:**
 - Icons for: CUSTOMER COMMENT CARD, REPORT A CONCERN, RECREATION ONLINE, NOTIFY ME.
 - NEWS FLASH** section with a red circle around the announcement:
 - Accommodations Tax and Community Assistance Grant Applications**
 - Applications for Accommodations Tax and Community Assistance Grants are now available. The applications are due by 3 p.m. on August 21. An applicants' workshop will be held at 3 p.m. on July 22 at the Charleston County Main Library at 68 Calhoun St. [Read on...](#)
 - Public Meeting Scheduled**
 - The City of Charleston will have a public meeting regarding the Late Night Bar and Restaurant ordinance on Thursday, July 17 at 5:30 pm in the auditorium at the Charleston Museum at 360 Meeting Street. [Read on...](#)
 - [VIEW ALL](#)
- Right Sidebar:** Image of a large tree, and a "Mayor's Welcome" section with a photo of Mayor Joe Riley and text: "Hello, I'm Mayor Joe Riley. Welcome to the City of Charleston, South Carolina's website. [Read More](#)".

Footer:

- THE CITY OF CHARLESTON, SC**
80 Broad Street
Charleston, SC 29401-0304
- QUICK LINKS**
[Home](#), [FAQs](#), [News](#), [Calendar](#)
- USING THIS SITE**
[Translate Page](#), [Site Map](#), [Copyright Notices](#), [Mobile Site](#), [Accessibility](#), [Powered by CivicPlus](#)

Taskbar: Windows taskbar with icons for Internet Explorer, Word, Outlook, and other applications. System clock shows 1:18 PM 7/11/2014.

2015 Community Assistance & Accommodations Tax Grant Applications



http://www.charleston-sc.gov/index.aspx?nid=123

City Of Charleston Employee L... Charleston, SC - Official Website Charleston, SC - Official We...

+ myConnections: Engage your community - connect to news, events and information you care about. [View more information...](#) [Sign In](#)

ABOUT US COMMUNITY DEPARTMENTS GOVERNMENT SERVICES **HELP CENTER**

Charleston
SOUTH CAROLINA

Search

Community Assistance & Accommodations Tax Grants

Budget Documents

CUSTOMER COMMENT CARD

REPORT A CONCERN

RECREATION ONLINE

NOTIFY ME

You are here: [Home](#) > [Departments](#) > [Budget, Finance & Revenue Collections](#) > [Budget & Management Division](#) > Community Assistance & Accommodations Tax Grants

Community Assistance & Accommodations Tax Grants

The City of Charleston provides grant funding annually to community organizations through two programs:

- Community Assistance (CA) Grants
- Accommodations Tax (A-Tax) Grants

Applications are accepted during the summer each year for the upcoming fiscal year beginning on January 1.

Please note: The application forms have changed. Please read carefully.

Community Assistance Grants

Community Assistance Grants are to assist organizations that serve a "public purpose" to the Charleston Community. "Public Purpose" is defined as having for its objective the "promotion of the public health, safety, morals, general welfare, security, prosperity, and contentment of all the inhabitants or residents, or at least a substantial part thereof."

Non-profit organizations that offer services in the areas of community development, the environment, public safety, education, health care, and human needs may apply.

Accommodations Tax Grants

Accommodations Tax Grant funds are designated specifically for tourism related activities, as required by South Carolina law. Data to support tourism impact is required.

Non-profit organizations that support and increase tourism through the promotion of the arts and cultural events and/or through the operation of facilities for artistic and cultural activities are eligible to apply for assistance.

CONTACT US

Budget, Finance and Revenue Collections
[Email](#)

116 Meeting Street
Charleston, SC 29401

Ph: 843-579-7529
Fx: 843-720-3901

QUICK LINKS

- Accommodations Tax Grant Application
- Community Assistance Grant Application

[VIEW ALL](#)

1:38 PM
7/11/2014

Instructions

- Section II Financial information must be completed on the form. An attached financial statement or budget will not be accepted.

Instructions

- All applications must be received (not postmarked) by 3pm on August 21, 2014.
- No faxed or emailed applications will be accepted.
- Complete all questions using 11pt font or larger. Use only the space provided on the application form.

Instructions

- Before submitting your application, please verify that you have included
 - ▣ Your IRS letter (if applicable)
 - ▣ a list of officers, staff, board members
 - ▣ A copy of your confirmation letter of registration from the SC Secretary of State's Division of Public Charities
 - ▣ The completed application with **ALL REQUIRED SIGNATURES.**
 - ▣ No other attachments will be accepted.

Instructions

- This application is available on the City's website. You may also request a digital copy by emailing Angie Lucarelli at lucarellia@charleston-sc.gov or phone (843)579-7529

Things to consider

- **BE REALISTIC –**
 - Is your budget consistent with the proposed activities?
 - What % of budget are you requesting from City?
 - Do you have the manpower and time to develop a solid reasonable proposal?

- Have you included **EVERYTHING** requested by the funding agency
 - (Have you followed the directions?)

Things to remember

- We consider:
 - ▣ Sustainability of your program/organization (plans for future funding)
 - ▣ Relevant importance of program to our community and city
 - ▣ Desirability of helping new groups and/or new projects get established
- If you are a grant recipient, you will be required to submit interim and final program and financial reports.

Things to remember

**IT IS IMPORTANT THAT INTERIM AND
FINAL REPORTS BE COMPLETED
ON TIME.**

- ❖ Information from these reports may be used to help determine your future eligibility for funding.

6. MARKETING AND MEDIA INFORMATION

Marketing and media information is requested to show how your organization used advertising and promotion of tourism to increase tourism in the Charleston region.

Please list the marketing and media coverage for your Event/Festival for coverage outside of Charleston County. Web site date is also requested; one suggested web site is Google analytics.

[illegible]

And Finally...

- Follow established accounting procedures in managing your agency's funds – keep all receipts, invoices and other financial records
- City's Internal Auditor will perform random audits of agencies receiving grants
- These awards are made with public funds and with that rests the need for responsible stewardship of those funds. **Accountability is essential.**

Budget Process

Aug 21	Applications due by 3pm
Sept 5	Interim Reports due from 2014 recipients
Sept 15 –Oct 13	Internal processing & review of applications
Oct - TBD	Budget discussions begin with Mayor
Oct 28	Public Hearing on Budget
Nov-TBD	Accommodations Tax Advisory Committee Meeting
Nov-TBD	Presentation of budget to City Council
Dec 2	First reading of Budget Ordinances (& Atax Budget)
Dec 16	Second & third Readings of Budget Ordinances

Important Dates - 2015

Jan Grant Award Notification Letters sent

Jan Community Assistance award checks mailed

Feb 27 Final reports due from 2014 recipients

2/15, 5/15, 8/15, 11/15 Approximate issue dates of Accommodations Tax Award Checks

Submittal Instructions

- One original and seven (7) copies of the application should be mailed or delivered to:

City of Charleston

Attn. Grants Committee

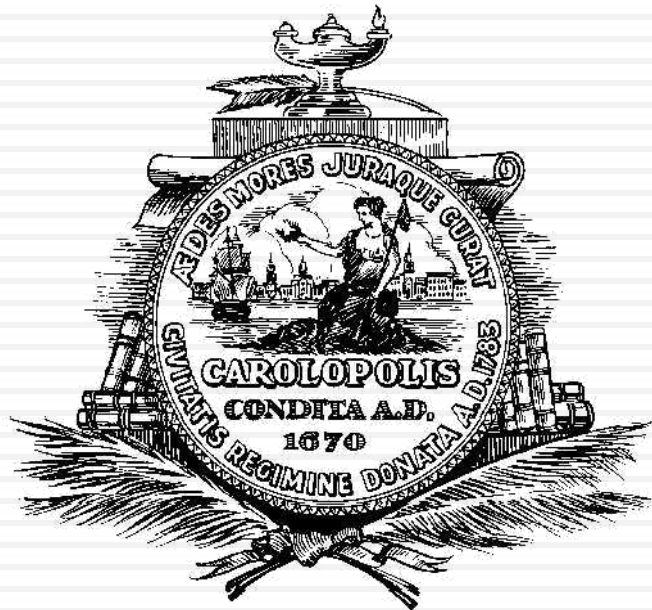
116 Meeting Street

P.O. Box 304

Charleston, SC 29402



Community Assistance Grant Application



Community Assistance Grants

- Purpose – assist tax-exempt organizations that provide beneficial services for the Charleston Community
- Types of organizations supported – those providing services in the areas of
 - ▣ education
 - ▣ health and human needs
 - ▣ community development
 - ▣ the environment
 - ▣ public safety

Community Assistance Grants

- Who decides –
 - Applications are received and reviewed by staff as part of the City's annual budget process conducted thru the CFO's office.
 - The proposed awards are included in the Mayor's budget and presented to City Council for its consideration.

Community Assistance Grants

- Funding – grants are paid directly from the City's General Fund
- Funding – in 2014, a total of approx. \$264,800 was allocated to 32 organizations or projects

Budget Breakdown:

PLEASE COMPLETE THE FOLLOWING BUDGET BREAKDOWN SECTIONS ON THESE PAGES (NO ATTACHMENTS.) You may get these figures from your most recently submitted IRS Form 990, or you may simply use your overall operating budget.

CONTRIBUTIONS, GIFTS, GRANTS & OTHER SIMILAR AMOUNTS

SOURCE	FY 2012	FY 2013	FY 2014
Government Grants			
Municipal	\$	\$	\$
County	\$	\$	\$
State	\$	\$	\$
Federal	\$	\$	\$
Foundation Grants	\$	\$	\$
Contributions/Federated Campaigns	\$	\$	\$
Membership dues	\$	\$	\$
Fundraising events	\$	\$	\$
TOTAL CONTRIBUTED INCOME	\$	\$	\$

PROGRAM SERVICE REVENUE

SOURCE	FY 2012	FY 2013	FY 2014
Fees / Sold Services			
Services	\$	\$	\$
Tuition / Fees	\$	\$	\$
Workshops, Seminars, Lectures, etc.	\$	\$	\$
Other (specify)	\$	\$	\$
Other (specify)	\$	\$	\$
TOTAL PROGRAM SERVICES REVENUE	\$	\$	\$

OTHER REVENUE

SOURCE	FY 2012	FY 2013	FY 2014
Publications (Newsletters, etc.)	\$	\$	\$
Concessions and/or Merchandise	\$	\$	\$
Advertising	\$	\$	\$
Space Rental Fees	\$	\$	\$
Other (specify)	\$	\$	\$
Other (specify)	\$	\$	\$
TOTAL EARNED INCOME	\$	\$	\$
TOTAL COMBINED INCOME (1+2+3)	\$	\$	\$

STATE ACCOMMODATIONS TAX GRANT PROGRAM



Purpose of Accommodations Tax Grants

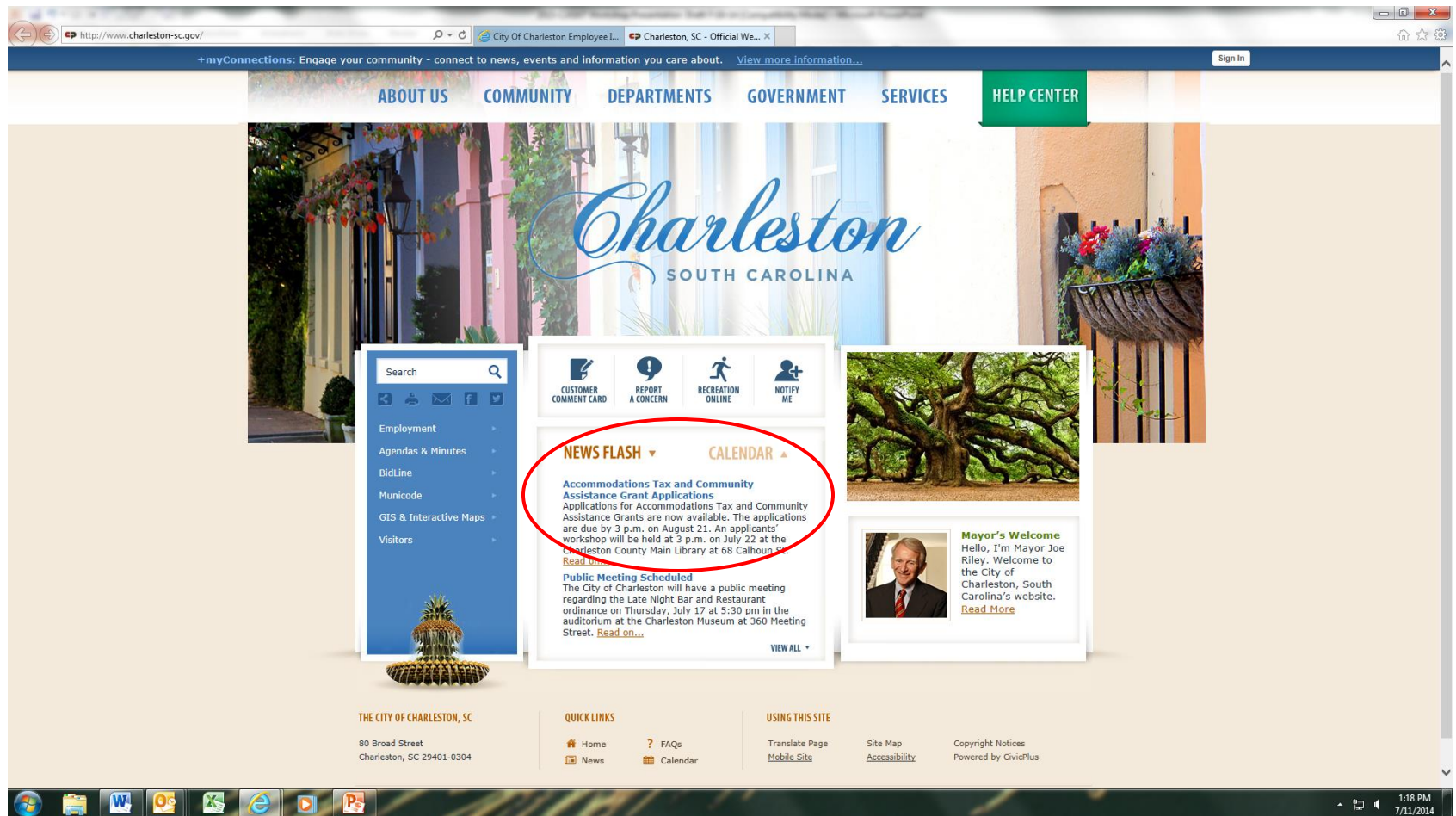
- These grants are provided through revenue received by the City of Charleston for its share of the 2% lodging tax levied by the State of South Carolina. These funds are awarded to Non-Profit Organizations and can only be used for activities related to tourism.

Additional Guidelines and Instructions for A-Tax Application

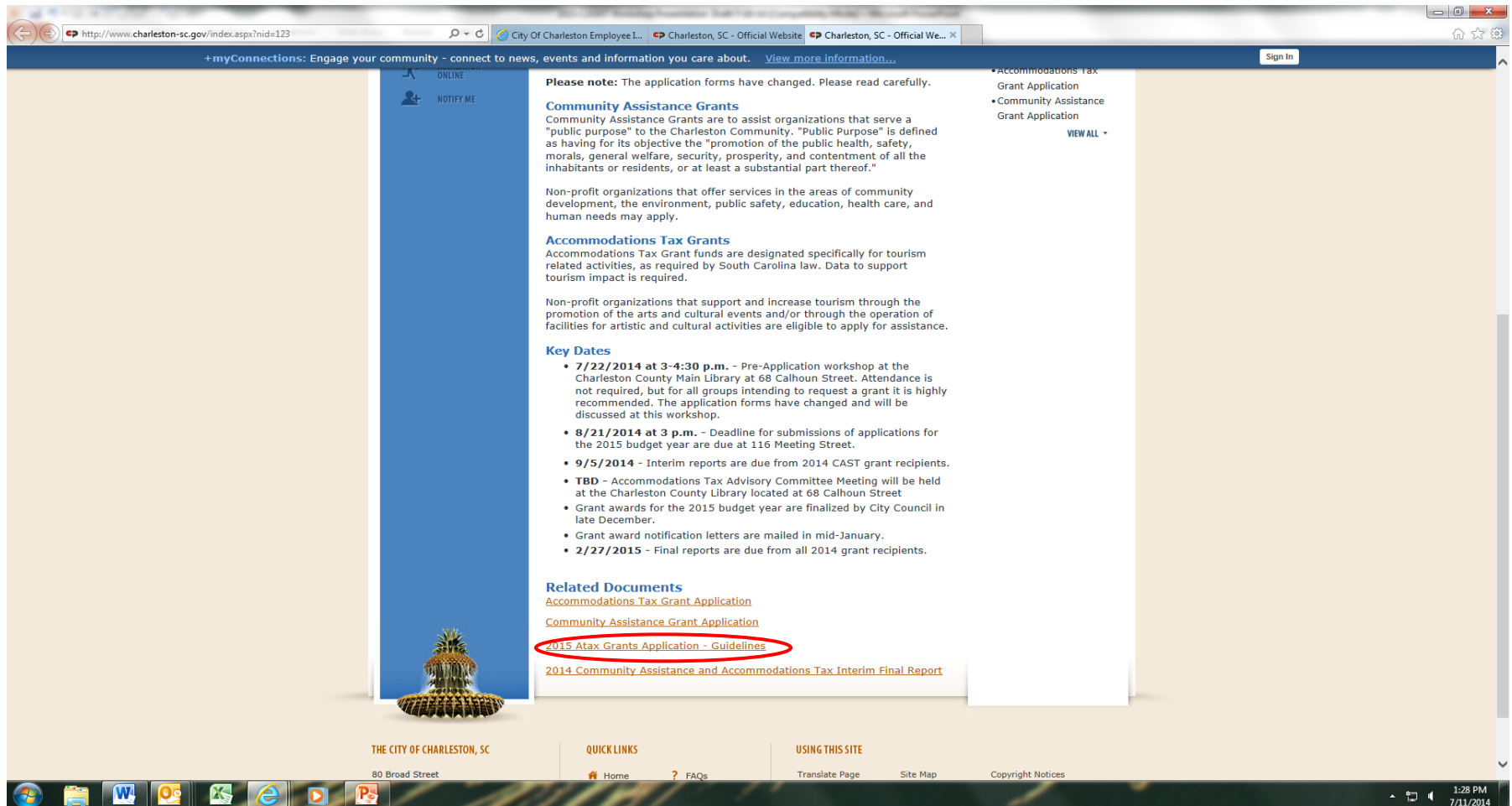
□ Web address –

www.charleston-sc.gov

Additional Guidelines and Instructions for A-Tax Application



2015 A-Tax Guidelines and Instructions



The screenshot shows a web browser window with the URL <http://www.charleston-sc.gov/index.aspx?nid=123>. The page header includes the text "+myConnections: Engage your community - connect to news, events and information you care about." and a "Sign In" button. The main content area is divided into three columns. The left column is a blue sidebar with a "NOTIFY ME" button. The middle column contains the main text, which includes a "Please note" section, "Community Assistance Grants" information, "Accommodations Tax Grants" information, and a "Key Dates" section. The right column is a white sidebar with a "VIEW ALL" button. The footer includes the City of Charleston logo, the address "80 Broad Street", and a "QUICKLINKS" section with links to "Home", "FAQs", "Translate Page", "Site Map", and "Copyright Notices". The taskbar at the bottom shows various application icons and the system clock indicating 1:28 PM on 7/11/2014.

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Non-profit organizations that support and increase tourism through the promotion of the arts and cultural events and/or through the operation of facilities for artistic and cultural activities are eligible to apply for assistance.

Key Dates

- **7/22/2014 at 3-4:30 p.m.** - Pre-Application workshop at the Charleston County Main Library at 68 Calhoun Street. Attendance is not required, but for all groups intending to request a grant it is highly recommended. The application forms have changed and will be discussed at this workshop.
- **8/21/2014 at 3 p.m.** - Deadline for submissions of applications for the 2015 budget year are due at 116 Meeting Street.
- **9/5/2014** - Interim reports are due from 2014 CAST grant recipients.
- **TBD** - Accommodations Tax Advisory Committee Meeting will be held at the Charleston County Library located at 68 Calhoun Street
- Grant awards for the 2015 budget year are finalized by City Council in late December.
- Grant award notification letters are mailed in mid-January.
- **2/27/2015** - Final reports are due from all 2014 grant recipients.

Related Documents

- [Accommodations Tax Grant Application](#)
- [Community Assistance Grant Application](#)
- [2015 Atax Grants Application - Guidelines](#)
- [2014 Community Assistance and Accommodations Tax Interim Final Report](#)

Activities related to tourism include

- A. advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity**
- B. promotion of the arts and cultural events**
- C. construction, maintenance, and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities**

State of SC Tourism Expenditure Review Committee

- ❑ Authorized by Accommodations Tax Statute
- ❑ Oversight of Spending of A-Tax Funds
- ❑ City must file a report annually
- ❑ Website: www.atax.sc.gov

Interpretation of “Tourism Related Expenditures”

- tourism is defined in the state law as the activities of people taking trips outside their home communities for any purpose, except daily commuting to and from work.
- “home community” - commonly accepted definition of travel as being 50 miles or more, one way, from the traveler’s origin or home.
- in addition to considering the 50 mile test, takes into consideration the following guiding principles:
 - The expenditure must be used to attract or provide for tourists.
 - The expenditure cannot be used for an item that would normally be provided by the county or municipality.

Application Instructions

- **SECTION III – FUNDING REQUEST FOR BUDGET YEAR 2015**
- Funding request for 2015 is designed to categorize requests based on the eligible expenditures outlined in state statute.
- Requests in multiple categories in the same application are permitted. Please be specific in your request.
- Ideally your request should fall into categories A, B or C to be clearly tourism-related.
- Requests in categories D or E must contain a clear link to tourism and adequate information to document the tourism link.

SECTION III:**FUNDING REQUEST FOR BUDGET YEAR 2015**

Please detail how the funds requested from the City of Charleston will be spent:

OPERATING		FY 2015 AMOUNT
A. Advertising or promotion related to tourism development (Check all that apply) <input type="checkbox"/> Television <input type="checkbox"/> Newspapers <input type="checkbox"/> Magazines <input type="checkbox"/> Billboards <input type="checkbox"/> Visitor's Guide <input type="checkbox"/> Radio <input type="checkbox"/> Websites <input type="checkbox"/> Rack Cards <input type="checkbox"/> Mailings (Out of County) <input type="checkbox"/> Other (Specify)		
		\$
B. Maintenance or operation of tourist-related building or facility (Specify)		\$
CAPITAL		
C. Construction of tourist-related building or facility (specify) Construction Period From: To:		\$
D. Equipment (specify)		\$
OTHER		
E. Other (specify)		\$
		\$
TOTAL REQUEST		\$



NOTE: Personnel salaries are NOT eligible for Accommodations Tax Funding

Section IV- Tourism Impact

- Tourism related justification and impact must be provided and documented. This section is specifically geared to provide documentation as outlined in the TERC interpretive policies and guidelines.

B. Please provide the following financial and demographic information:

	Previous Year 2013	Current Year 2014
Total budget of event/project	\$	\$
Amount funded by A-Tax – City	\$	\$
Amount Funded by A-Tax – All sources	\$	\$
Total Attendance		
Total number of tourists (non-residents)		

C. What method did you use to calculate the total attendance and the total number of tourists that were non-residents in item B above? Please provide specific examples.



This section is limited to 880 characters including spaces, which is approximately 125 words

D. Describe how the 2015 program will be evaluated. Include methods of measuring tourism impact, and the data collection methods.

This box is limited to 1400 characters including spaces, which is approximately 200 words.

Page 6, question B

	Event A	Event B	Event C	Event D
Total Budget of event/project	\$ 100,000.00	\$ 100,000.00	\$ 2,000,000.00	\$ 25,000.00
Amount funded by A-Tax - City	\$ 10,000.00	\$ 20,000.00	\$ 100,000.00	\$ 2,500.00
Amount funded by A-tax - all sources	\$ 15,000.00	\$ 40,000.00	\$ 200,000.00	\$ 2,500.00
Total attendance	2,000	10,000	40,000	500
Total number of tourists (non-residents)	1,000	2,000	30,000	50

% of budget funded by total A-tax	15%	40%	10%	10%
% of tourists attending	50%	20%	75%	10%
City A-tax amount per tourist	\$ 10.00	\$ 10.00	\$ 3.33	\$ 50.00

Section V: Marketing or Media Information

- This section is designed to document the marketing and promotional activities conducted for the project/event or facility. We will use this section to assess your efforts to impact tourism, regardless of the actual tourism attendance reported in the previous section.

- 2 Parts
 - Advertising
 - Web Analytics

Advertising

- Type-TV, Radio, print
- Exposure/audience
- Include all, regardless of whether paid with A-Tax funds

Web Analytics

- ❑ Is required for 2015 application.
- ❑ Ideally, have one year's worth of data.
- ❑ If not, provide what you have, but be sure to specify what period of time is covered.

Web Analytics

- Web Analytics:
 - Is the process of analyzing the behavior of visitors to a Web site
 - The analysis can include determining the likelihood that a given customer will repurchase a product after having purchased in the past
 - Personalizing the site to customers who visit it repeatedly
 - Observing the geographic regions from which the most and the least customers visit the site and purchase specific products

Contact Information

- Cherrie-Ann Caton

- E-Mail Address : catonc@charleston-sc.gov

- Phone: (843) 965-4055

- Kathy Mercer

- E-Mail Address : mercerk@charleston-sc.gov

- Phone: (843) 724-3715